Merging ARIES Reports in Microsoft Excel

ARIES User Group

June 2, 2011

Merging ARIES Reports in Microsoft Excel

Today's Presentation will cover:

- Limitations to Ad Hoc report design in ARIES ReportExport
- How to merge two ARIES reports using the Excel VLOOKUP() function
- Online demo of merging a Fix-It report with a Primary Staff Person report
- Other uses of VLOOKUP() and other ways to merge reports

ARIES ReportExport Limitations

- When creating Ad Hoc reports in ReportExport, not all data elements are available for all reports.
- This means that some reports seem to be missing important data.
- The ARIES Help Desk often cannot meet certain report requests due to the limitations of ReportExport.
- The most often requested data element is Primary Staff Person.

ARIES ReportExport Limitations

- When creating an Ad Hoc report, you must start by selecting a Primary Table…

ARIES ReportExport Limitations

- …then you may select Additional Tables needed for your report.

ARIES ReportExport Limitations

- When you select the Client Table as the Primary Table…

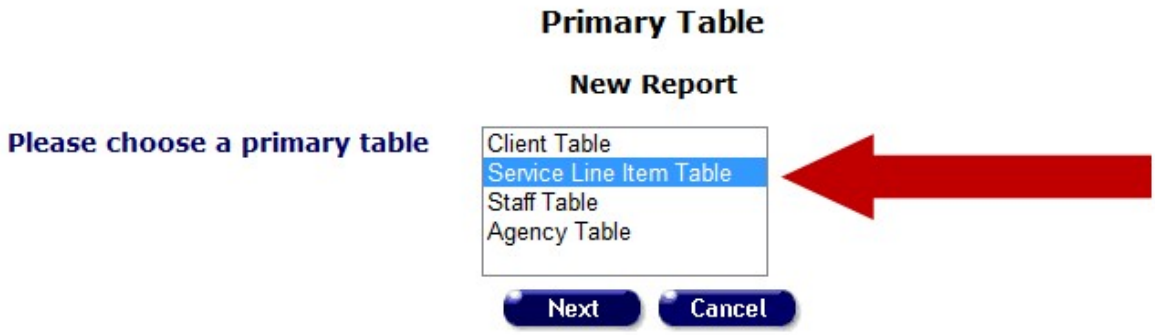
ARIES ReportExport Limitations

- When you select the Client Table as the Primary Table…

- …adding the Staff Table will give you the name of the client's Primary Staff Person.

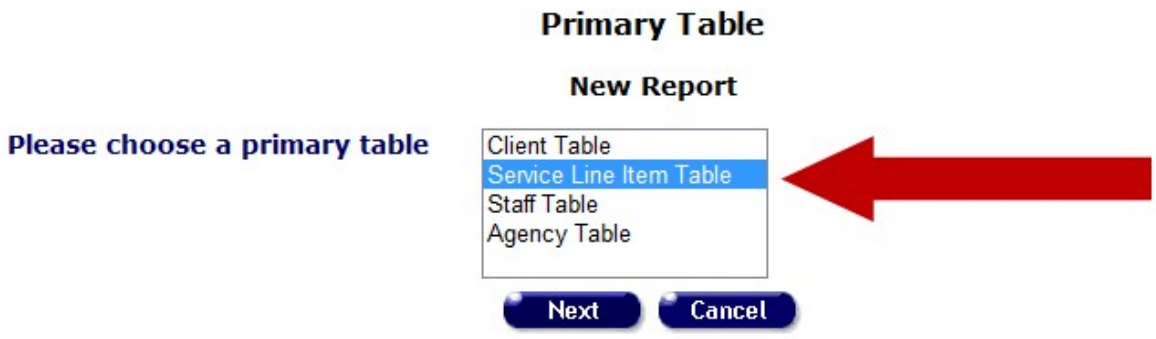
ARIES ReportExport Limitations

- When you select the Service Line Item Table as the Primary Table…



ARIES ReportExport Limitations

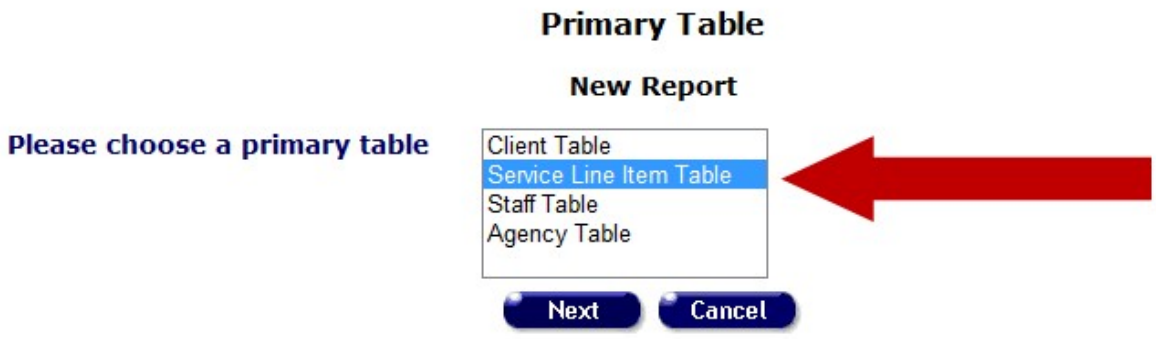
- When you select the Service Line Item Table as the Primary Table…



- …adding the Staff Table will give you the name of the Staff Person who provided the Service.

ARIES ReportExport Limitations

- Most requests for Ad Hoc reports are based on clients served within a date range.



- This requires selecting the Service Line Item Table as the Primary Table, making it impossible to add a client's Primary Staff Person to such a report… ***UNTIL NOW!***

Merging ARIES Reports

- Using Microsoft Excel, data from two different ARIES reports can be merged into a composite report.
- The reports must both contain a *Unique Client Identifier*. The easiest one to use is the ARIES ID.
- The *Primary Report* is the most complete of the two reports. It must contain one row per client.
- The *Secondary Report* is a look-up table. It contains the data you want to add to the Primary Report. It also must contain one row per client.

Merging ARIES Reports

- The ARIES "Fix-It" reports are part of OA's *Data Improvement Project (DIP)*. Each month, we focus on a different data element.

- The "Fix-It" reports identify clients that do not meet the criteria for that month's data element so agencies can "fix" the data problems.

- The "Fix-It" report would be the *Primary Report* for merging.

Merging ARIES Reports

The "Fix-It" report for Race/Ethnicity:

Fix-It: Race and Ethnicity

ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors	Service Count
10000788	Ama, Mic T	Yes	Unknown/Unreported	Missing Race 1	1
10001689	9000, Hal J	Yes	Other	Missing Race 1	3
10004388	Baker, Ria G	No	Other	Missing Race 1	5
10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race 1	1
10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race 1	1
10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race 1	1
10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race 1	2
10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race 1	1
10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race 1	2
10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race 1	1
10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1
10003731	Abcdr, Jklm	Unknown	Black	Missing Hispanic Ethnicity,	3

All data is from the ARIES Demo Site and is fictitious.

Merging ARIES Reports

- Correcting data problems on the "Fix-It" reports might be a task for the client's Primary Staff Person – but the reports do not (and cannot) include that information!

- The only way to obtain the name of the client's Primary Staff Person is to run a separate report.

- The Primary Staff Person report would be the *Secondary Report* for merging.

Merging ARIES Reports

Ad Hoc report of Primary Staff Person:

ARIES ID and Primary Staff Name

ARIES ID	Staff Name
10000000	Matalin, Mary
10000001	Reagan, Kes
10000002	Martin, Mary
10000003	Reagan, Kes
10000004	Cooper, Joe
10000005	Matalin, Mary
10000006	Martin, Mary
10000007	Biggs, James
10000008	Cooper, Joe
10000009	Reagan, Kes
10000010	Martin, Mary
10000011	Biggs, James
10000012	Cooper, Joe
10000013	Matalin, Mary
10000014	Cooper, Joe
10000015	Biggs, James
10000016	Martin, Mary
10000017	Matalin, Mary
10000018	Cooper, Joe
10000019	Reagan, Kes
10000020	Martin, Mary
10000021	Biggs, James

All data is from the ARIES Demo Site and is fictitious.

Merging ARIES Reports

Excel can take an ARIES ID from the Primary Report, look it up in the Secondary Report, and retrieve the Staff Name:

Fix-It: Race and Ethnicity

ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors
10000788	Ama, Mic T	Yes	Unknown	Missing Race 1
10000003	0000, Hal J	Yes	Other	Missing Race 1
10004388	Baker, Ria G	No	Other	Missing Race 1
10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race 1
10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race 1

Reagan, Kes

ARIES ID and Primary Staff Name

ARIES ID	Staff Name
10000000	Matlin, Mary
10000001	Reagan, Kes
10000002	Martin, Mary
10000003	Reagan, Kes
10000004	Cooper, Joe

Merging ARIES Reports

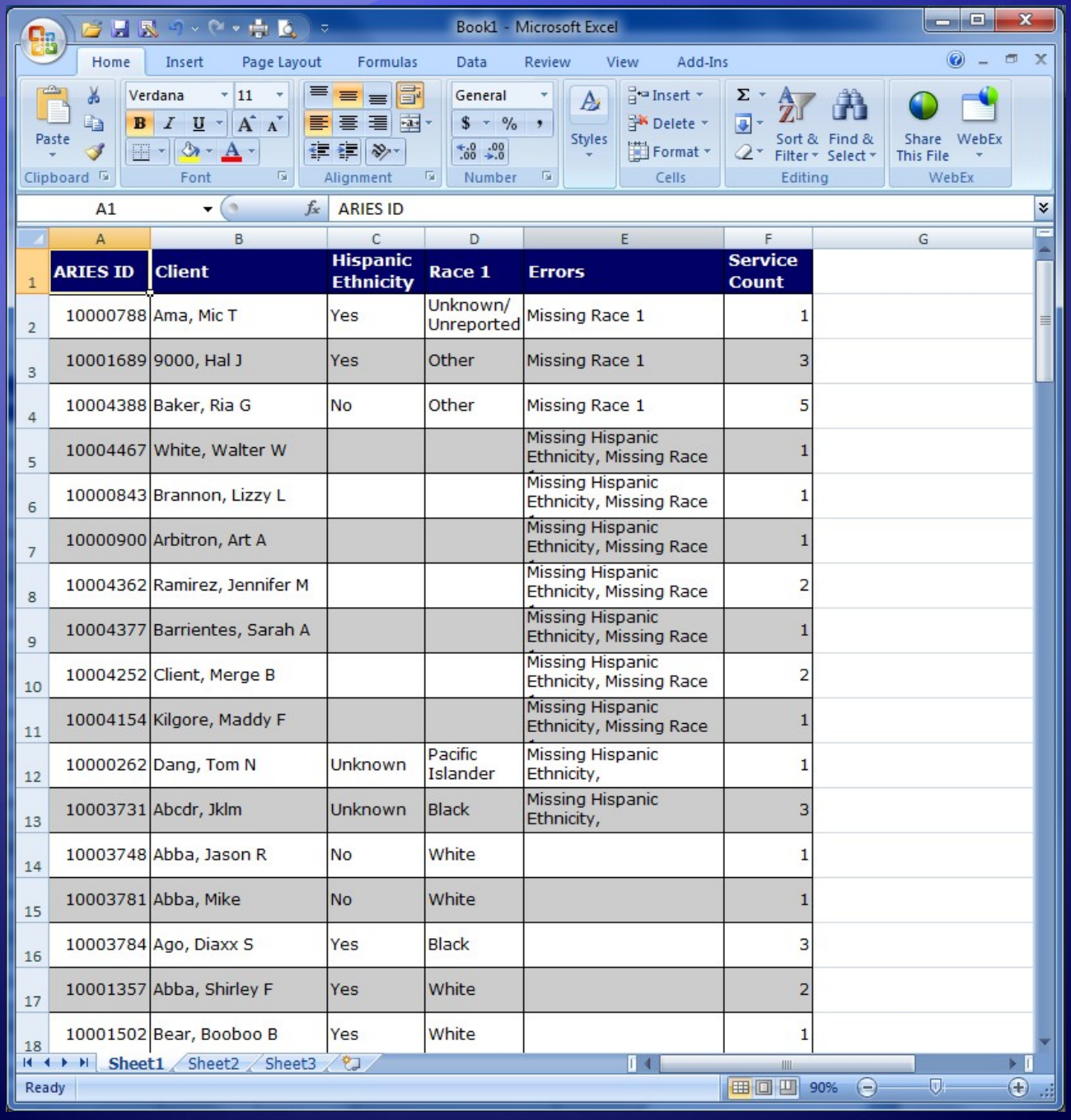
To begin, first run your Primary Report:

Fix-It: Race and Ethnicity

ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors	Service Count
10000788	Ama, Mic T	Yes	Unknown/Unreported	Missing Race 1	1
10001689	9000, Hal J	Yes	Other	Missing Race 1	3
10004388	Baker, Ria G	No	Other	Missing Race 1	5
10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race 1	1
10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race 1	1
10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race 1	1
10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race 1	2
10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race 1	1
10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race 1	2
10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race 1	1
10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1
10003731	Abcdr, Jklm	Unknown	Black	Missing Hispanic Ethnicity,	3

Merging ARIES Reports

Copy and Paste into Sheet 1 of Excel:



	A	B	C	D	E	F	G
1	ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors	Service Count	
2	10000788	Ama, Mic T	Yes	Unknown/ Unreported	Missing Race 1	1	
3	10001689	9000, Hal J	Yes	Other	Missing Race 1	3	
4	10004388	Baker, Ria G	No	Other	Missing Race 1	5	
5	10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race	1	
6	10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race	1	
7	10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race	1	
8	10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race	2	
9	10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race	1	
10	10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race	2	
11	10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race	1	
12	10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1	
13	10003731	Abcdr, Jklm	Unknown	Black	Missing Hispanic Ethnicity,	3	
14	10003748	Abba, Jason R	No	White		1	
15	10003781	Abba, Mike	No	White		1	
16	10003784	Ago, Diaxx S	Yes	Black		3	
17	10001357	Abba, Shirley F	Yes	White		2	
18	10001502	Bear, Booboo B	Yes	White		1	

Merging ARIES Reports

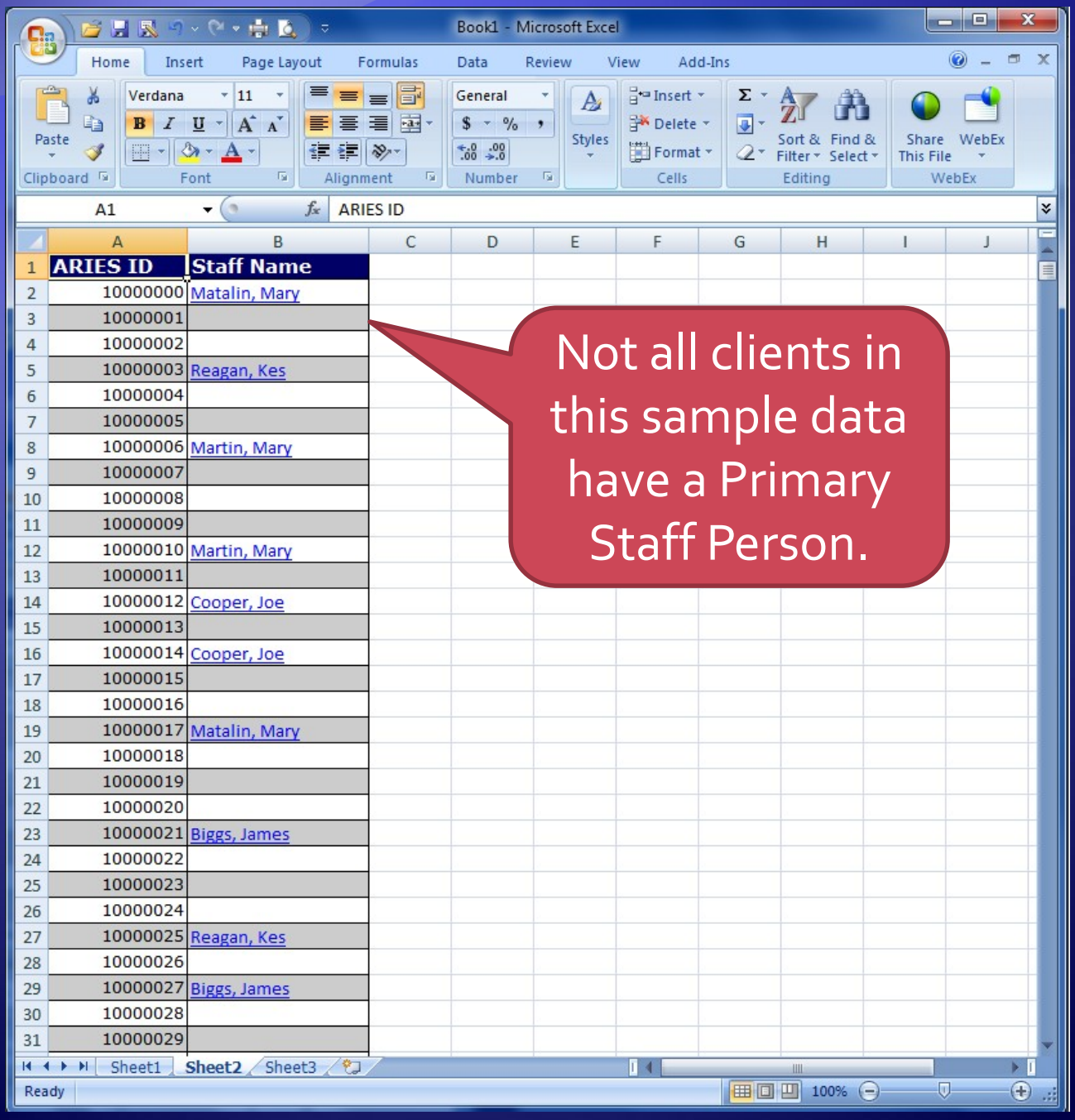
Next, run your Secondary Report:

ARIES ID and Primary Staff Name

ARIES ID	Staff Name
10000000	Matalin, Mary
10000001	Reagan, Kes
10000002	Martin, Mary
10000003	Reagan, Kes
10000004	Cooper, Joe
10000005	Matalin, Mary
10000006	Martin, Mary
10000007	Biggs, James
10000008	Cooper, Joe
10000009	Reagan, Kes
10000010	Martin, Mary
10000011	Biggs, James
10000012	Cooper, Joe
10000013	Matalin, Mary
10000014	Cooper, Joe
10000015	Biggs, James
10000016	Martin, Mary
10000017	Matalin, Mary
10000018	Cooper, Joe
10000019	Reagan, Kes
10000020	Martin, Mary
10000021	Biggs, James

Merging ARIES Reports

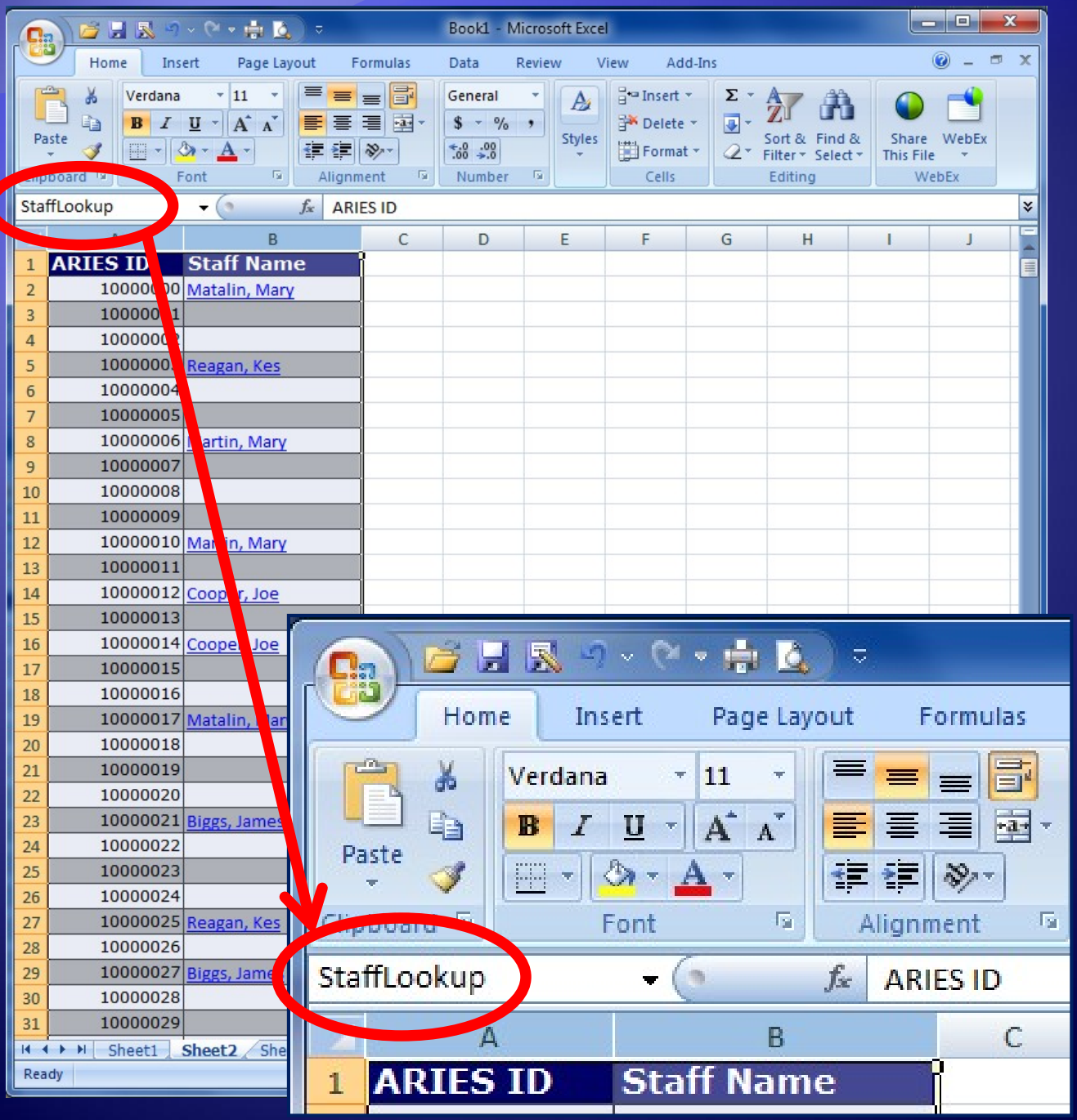
Copy and Paste into Sheet **2** of Excel:



	A	B
1	ARIES ID	Staff Name
2	10000000	Matalin, Mary
3	10000001	
4	10000002	
5	10000003	Reagan, Kes
6	10000004	
7	10000005	
8	10000006	Martin, Mary
9	10000007	
10	10000008	
11	10000009	
12	10000010	Martin, Mary
13	10000011	
14	10000012	Cooper, Joe
15	10000013	
16	10000014	Cooper, Joe
17	10000015	
18	10000016	
19	10000017	Matalin, Mary
20	10000018	
21	10000019	
22	10000020	
23	10000021	Biggs, James
24	10000022	
25	10000023	
26	10000024	
27	10000025	Reagan, Kes
28	10000026	
29	10000027	Biggs, James
30	10000028	
31	10000029	

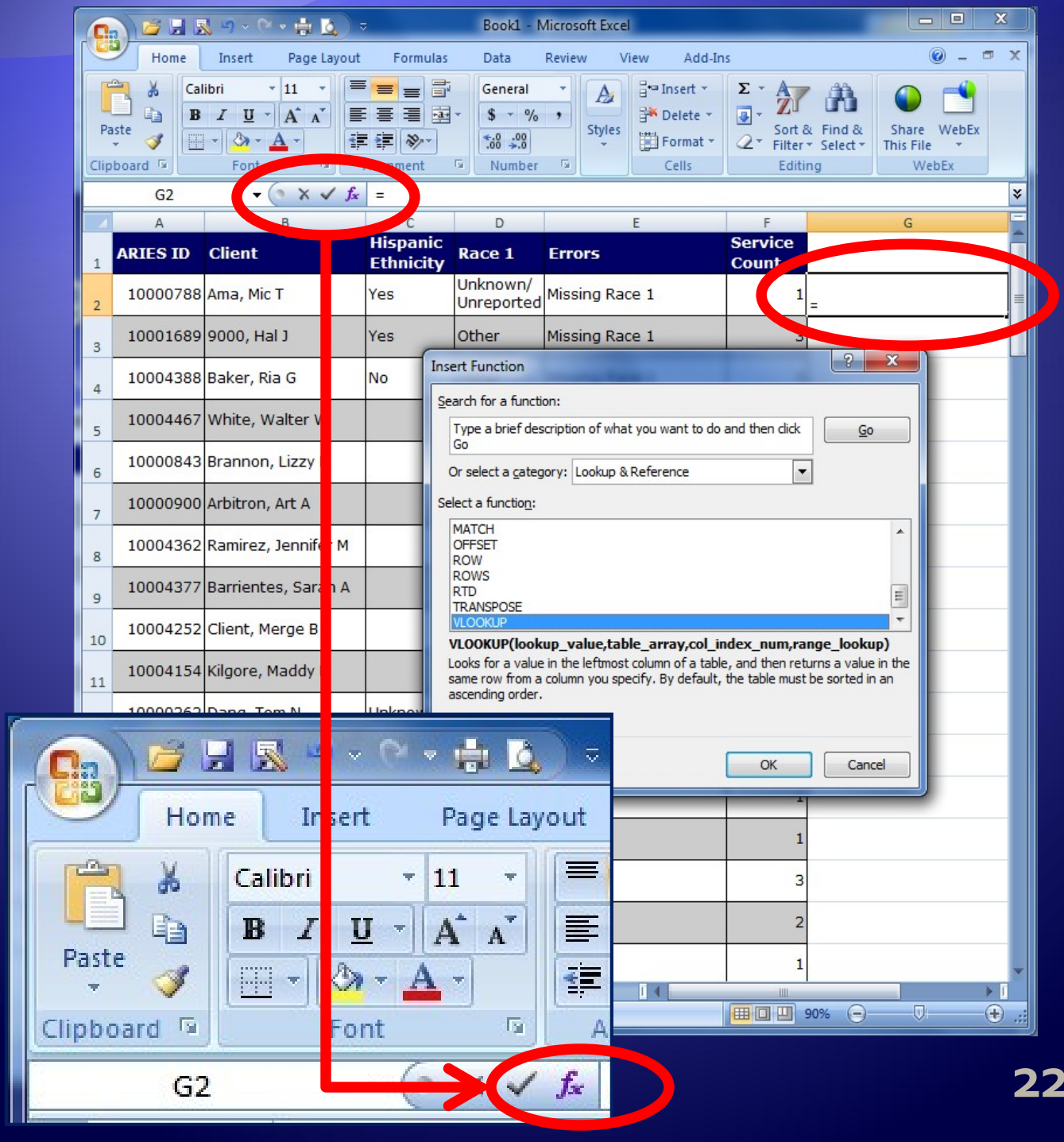
Merging ARIES Reports

Select columns A & B, name the range:



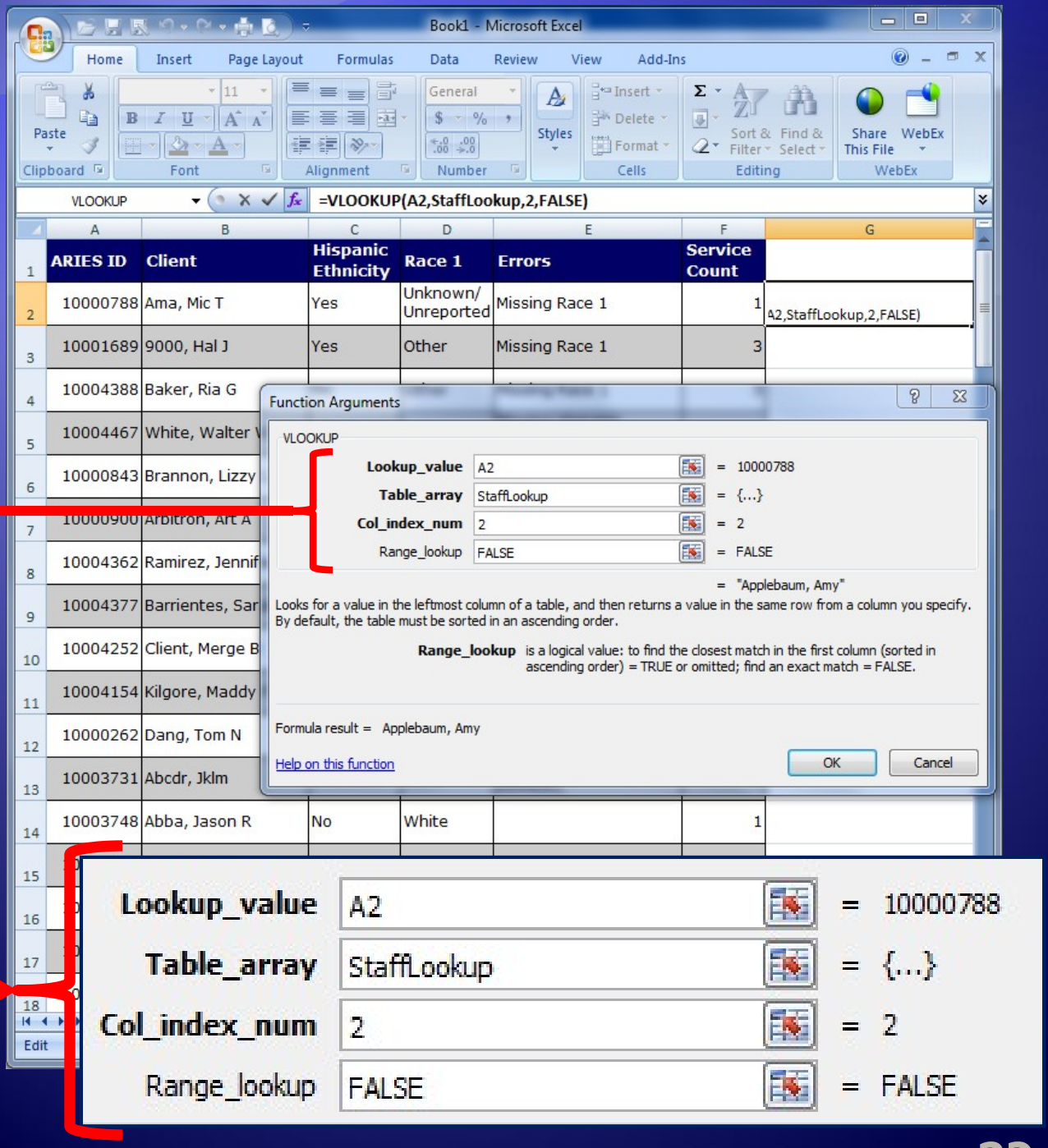
Merging ARIES Reports

On Sheet 1, first blank cell of first data row, click Function (fx) and select VLOOKUP:



Merging ARIES Reports

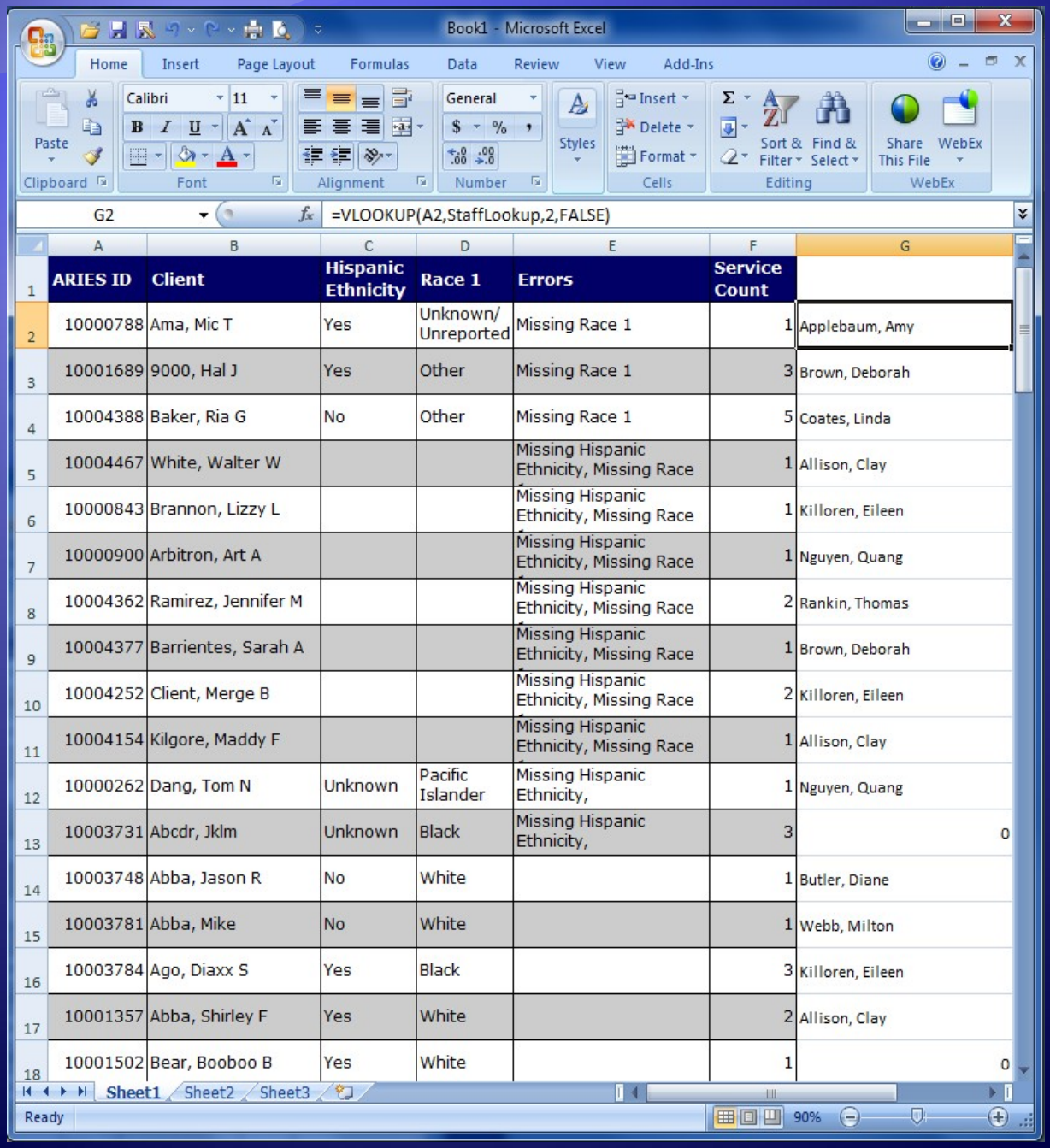
Enter the function parameters below:



ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors	Service Count
10000788	Ama, Mic T	Yes	Unknown/ Unreported	Missing Race 1	1
10001689	9000, Hal J	Yes	Other	Missing Race 1	3
10004388	Baker, Ria G				
10004467	White, Walter				
10000843	Brannon, Lizzy				
10000900	Arbitron, Art A				
10004362	Ramirez, Jennif				
10004377	Barrientes, Sar				
10004252	Client, Merge B				
10004154	Kilgore, Maddy				
10000262	Dang, Tom N				
10003731	Abcdr, Jklm				
10003748	Abba, Jason R	No	White		1

Merging ARIES Reports

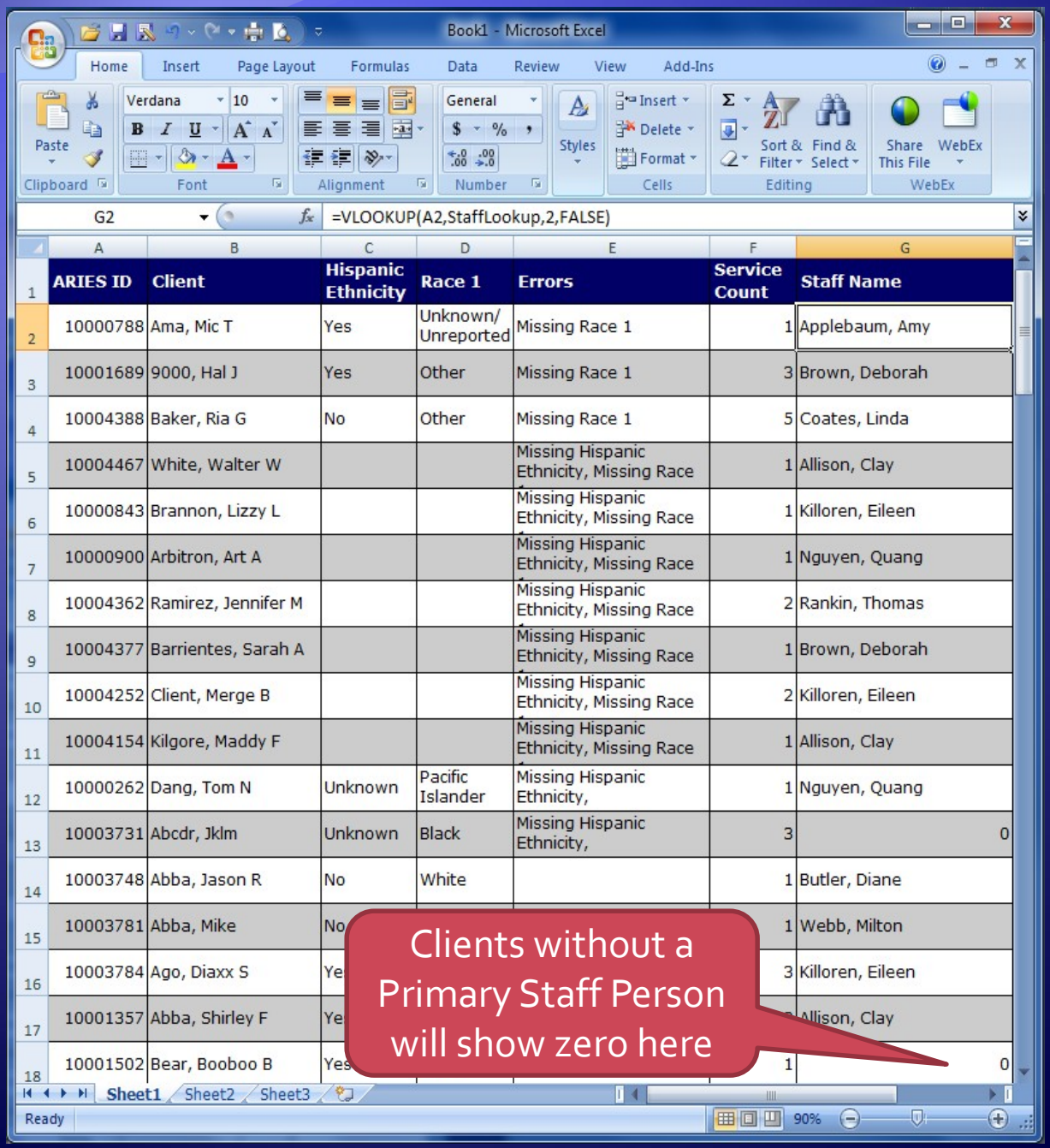
Copy the cell containing the VLOOKUP function to the rest of the column:



	A	B	C	D	E	F	G
1	ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors	Service Count	
2	10000788	Ama, Mic T	Yes	Unknown/ Unreported	Missing Race 1	1	Applebaum, Amy
3	10001689	9000, Hal J	Yes	Other	Missing Race 1	3	Brown, Deborah
4	10004388	Baker, Ria G	No	Other	Missing Race 1	5	Coates, Linda
5	10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race	1	Allison, Clay
6	10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race	1	Killoren, Eileen
7	10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race	1	Nguyen, Quang
8	10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race	2	Rankin, Thomas
9	10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race	1	Brown, Deborah
10	10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race	2	Killoren, Eileen
11	10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race	1	Allison, Clay
12	10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1	Nguyen, Quang
13	10003731	Abcdr, Jklm	Unknown	Black	Missing Hispanic Ethnicity,	3	0
14	10003748	Abba, Jason R	No	White		1	Butler, Diane
15	10003781	Abba, Mike	No	White		1	Webb, Milton
16	10003784	Ago, Diaxx S	Yes	Black		3	Killoren, Eileen
17	10001357	Abba, Shirley F	Yes	White		2	Allison, Clay
18	10001502	Bear, Booboo B	Yes	White		1	0

Merging ARIES Reports

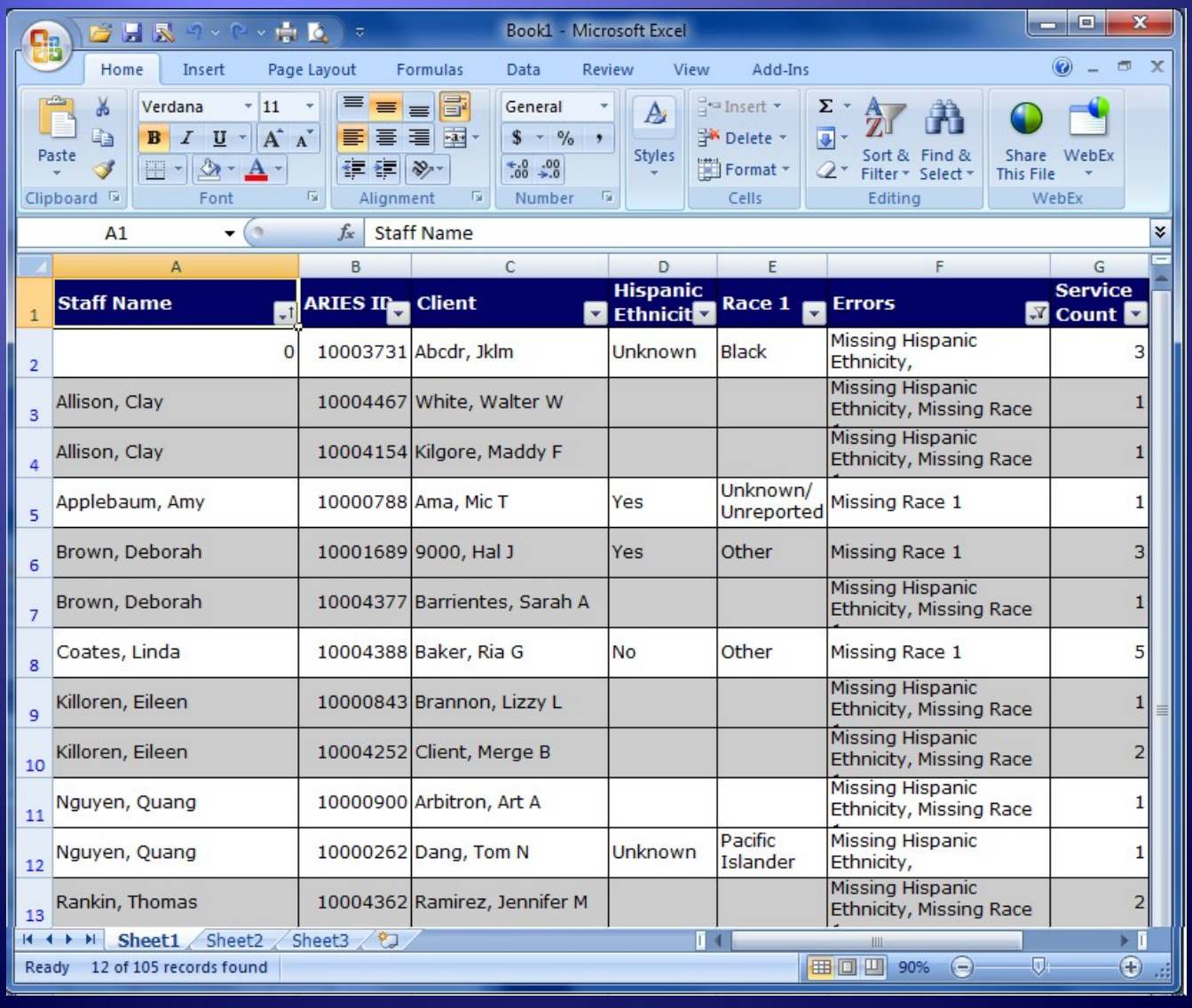
Format as desired, and *VOILA!*



	A	B	C	D	E	F	G
1	ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors	Service Count	Staff Name
2	10000788	Ama, Mic T	Yes	Unknown/ Unreported	Missing Race 1	1	Applebaum, Amy
3	10001689	9000, Hal J	Yes	Other	Missing Race 1	3	Brown, Deborah
4	10004388	Baker, Ria G	No	Other	Missing Race 1	5	Coates, Linda
5	10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race	1	Allison, Clay
6	10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race	1	Killoren, Eileen
7	10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race	1	Nguyen, Quang
8	10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race	2	Rankin, Thomas
9	10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race	1	Brown, Deborah
10	10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race	2	Killoren, Eileen
11	10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race	1	Allison, Clay
12	10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1	Nguyen, Quang
13	10003731	Abcdr, Jklm	Unknown	Black	Missing Hispanic Ethnicity,	3	0
14	10003748	Abba, Jason R	No	White		1	Butler, Diane
15	10003781	Abba, Mike	No			1	Webb, Milton
16	10003784	Ago, Diaxx S	Ye			3	Killoren, Eileen
17	10001357	Abba, Shirley F	Ye				Allison, Clay
18	10001502	Bear, Booboo B	Yes			1	0

Merging ARIES Reports

You can move the Staff column, sort on Staff, and filter on Errors (non-blank) to list only clients needing follow-up grouped by Primary Staff Person:



	A	B	C	D	E	F	G
1	Staff Name	ARIES ID	Client	Hispanic Ethnicit	Race 1	Errors	Service Count
2	0	10003731	Abcdr, Jklm	Unknown	Black	Missing Hispanic Ethnicity,	3
3	Allison, Clay	10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race	1
4	Allison, Clay	10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race	1
5	Applebaum, Amy	10000788	Ama, Mic T	Yes	Unknown/ Unreported	Missing Race 1	1
6	Brown, Deborah	10001689	9000, Hal J	Yes	Other	Missing Race 1	3
7	Brown, Deborah	10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race	1
8	Coates, Linda	10004388	Baker, Ria G	No	Other	Missing Race 1	5
9	Killoren, Eileen	10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race	1
10	Killoren, Eileen	10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race	2
11	Nguyen, Quang	10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race	1
12	Nguyen, Quang	10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1
13	Rankin, Thomas	10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race	2

Online Demo

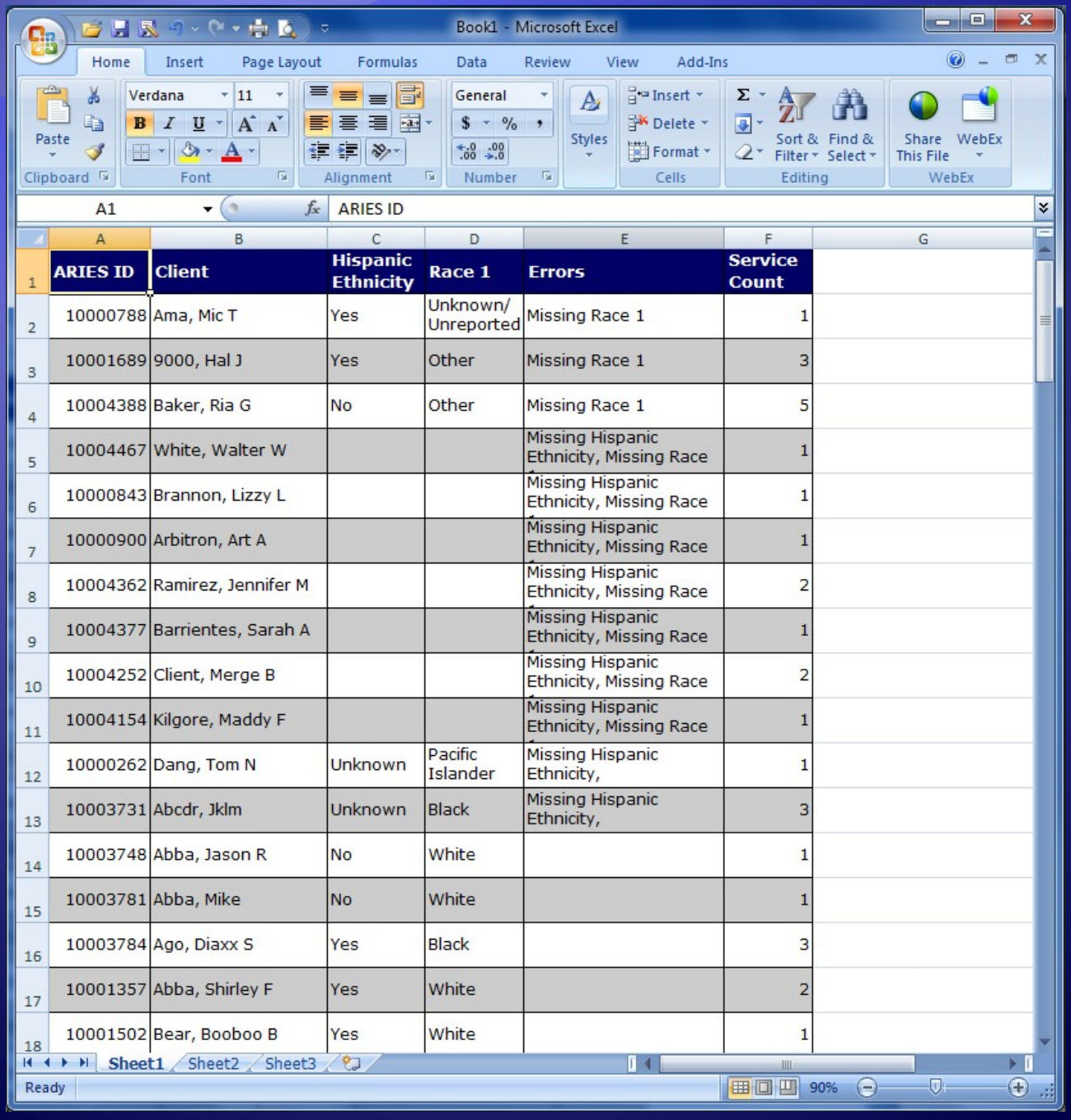
To begin, first run your Primary Report:

Fix-It: Race and Ethnicity

ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors	Service Count
10000788	Ama, Mic T	Yes	Unknown/Unreported	Missing Race 1	1
10001689	9000, Hal J	Yes	Other	Missing Race 1	3
10004388	Baker, Ria G	No	Other	Missing Race 1	5
10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race 1	1
10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race 1	1
10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race 1	1
10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race 1	2
10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race 1	1
10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race 1	2
10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race 1	1
10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1
10003731	Abcdr, Jklm	Unknown	Black	Missing Hispanic Ethnicity,	3

Online Demo

Copy and Paste into Sheet 1 of Excel:



ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors	Service Count
10000788	Ama, Mic T	Yes	Unknown/ Unreported	Missing Race 1	1
10001689	9000, Hal J	Yes	Other	Missing Race 1	3
10004388	Baker, Ria G	No	Other	Missing Race 1	5
10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race	1
10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race	1
10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race	1
10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race	2
10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race	1
10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race	2
10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race	1
10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1
10003731	Abcdr, Jklm	Unknown	Black	Missing Hispanic Ethnicity,	3
10003748	Abba, Jason R	No	White		1
10003781	Abba, Mike	No	White		1
10003784	Ago, Diaxx S	Yes	Black		3
10001357	Abba, Shirley F	Yes	White		2
10001502	Bear, Booboo B	Yes	White		1

Online Demo

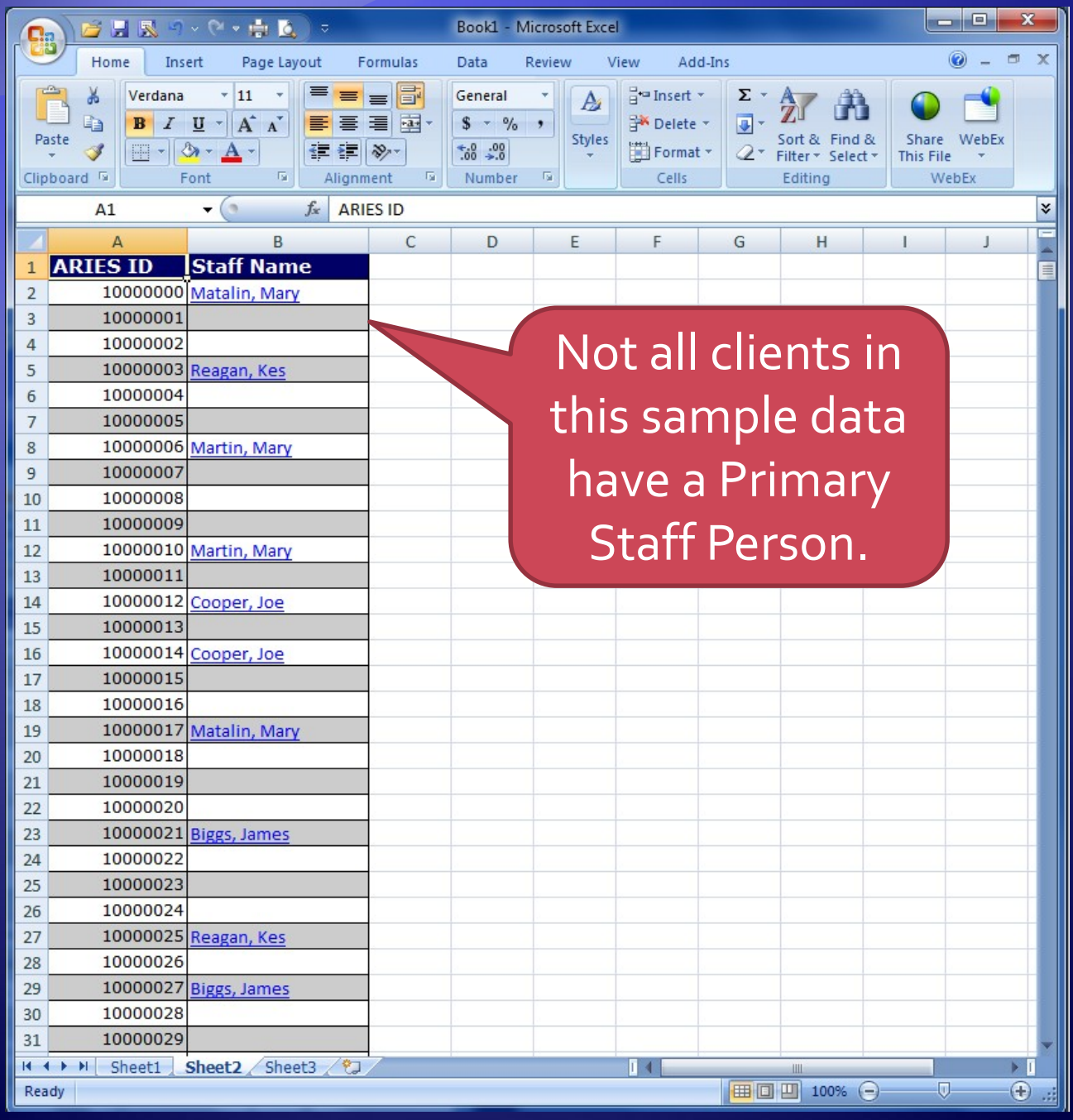
Next, run your Secondary Report:

ARIES ID and Primary Staff Name

ARIES ID	Staff Name
10000000	Matalin, Mary
10000001	Reagan, Kes
10000002	Martin, Mary
10000003	Reagan, Kes
10000004	Cooper, Joe
10000005	Matalin, Mary
10000006	Martin, Mary
10000007	Biggs, James
10000008	Cooper, Joe
10000009	Reagan, Kes
10000010	Martin, Mary
10000011	Biggs, James
10000012	Cooper, Joe
10000013	Matalin, Mary
10000014	Cooper, Joe
10000015	Biggs, James
10000016	Martin, Mary
10000017	Matalin, Mary
10000018	Cooper, Joe
10000019	Reagan, Kes
10000020	Martin, Mary
10000021	Biggs, James

Online Demo

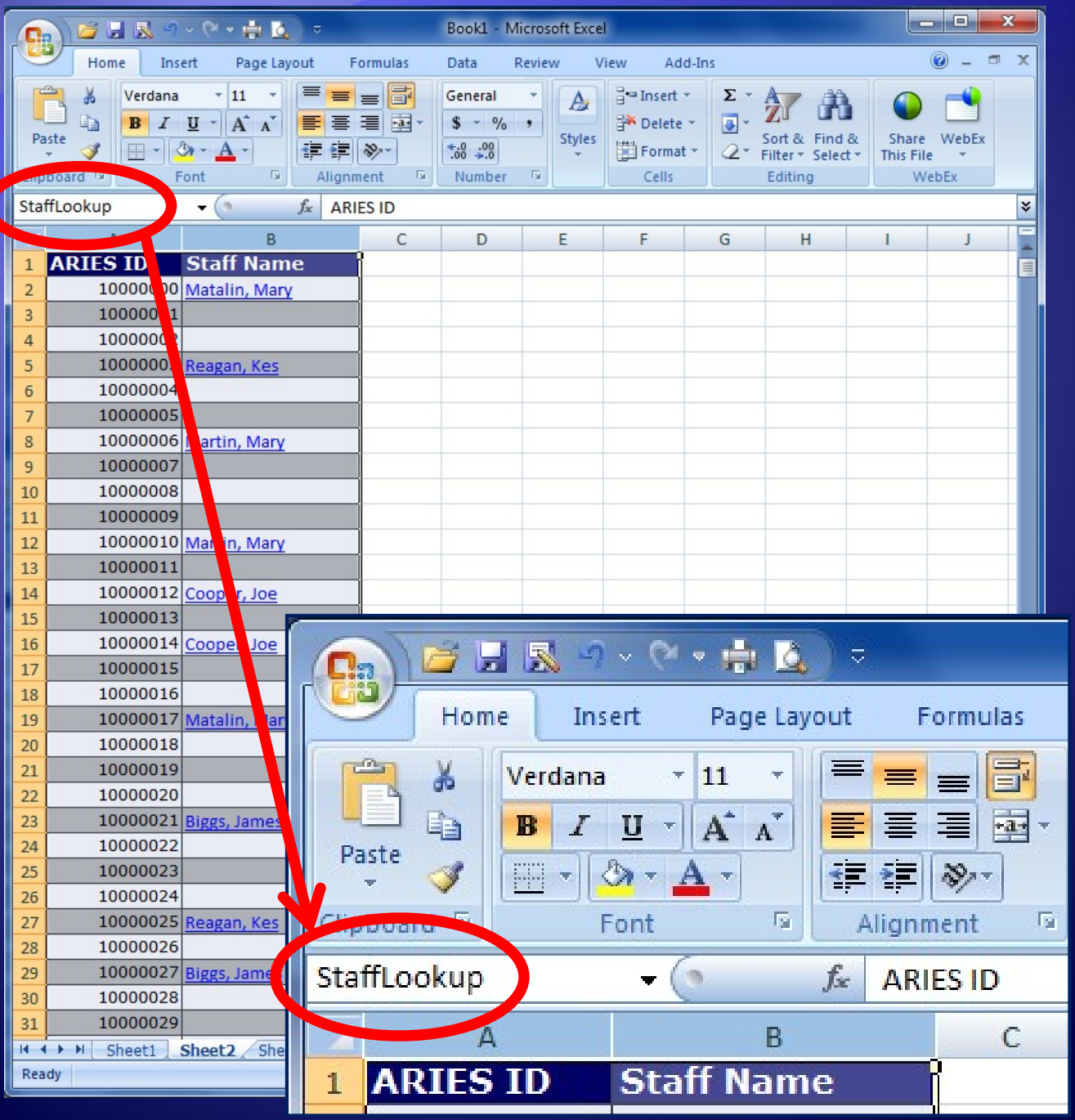
Copy and Paste into Sheet **2** of Excel:



	A	B
1	ARIES ID	Staff Name
2	10000000	Matalin, Mary
3	10000001	
4	10000002	
5	10000003	Reagan, Kes
6	10000004	
7	10000005	
8	10000006	Martin, Mary
9	10000007	
10	10000008	
11	10000009	
12	10000010	Martin, Mary
13	10000011	
14	10000012	Cooper, Joe
15	10000013	
16	10000014	Cooper, Joe
17	10000015	
18	10000016	
19	10000017	Matalin, Mary
20	10000018	
21	10000019	
22	10000020	
23	10000021	Biggs, James
24	10000022	
25	10000023	
26	10000024	
27	10000025	Reagan, Kes
28	10000026	
29	10000027	Biggs, James
30	10000028	
31	10000029	

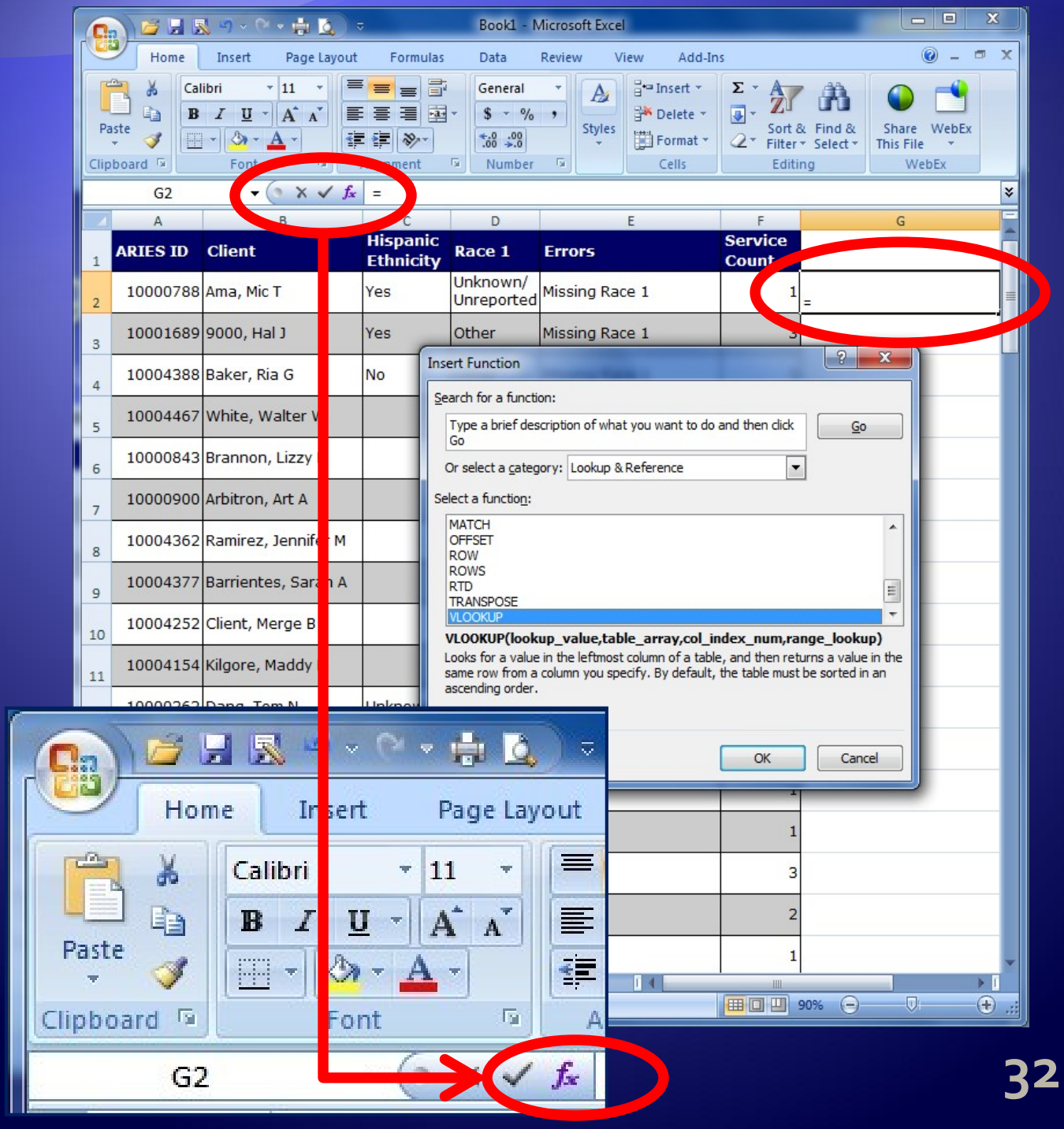
Online Demo

Select columns A & B, name the range:



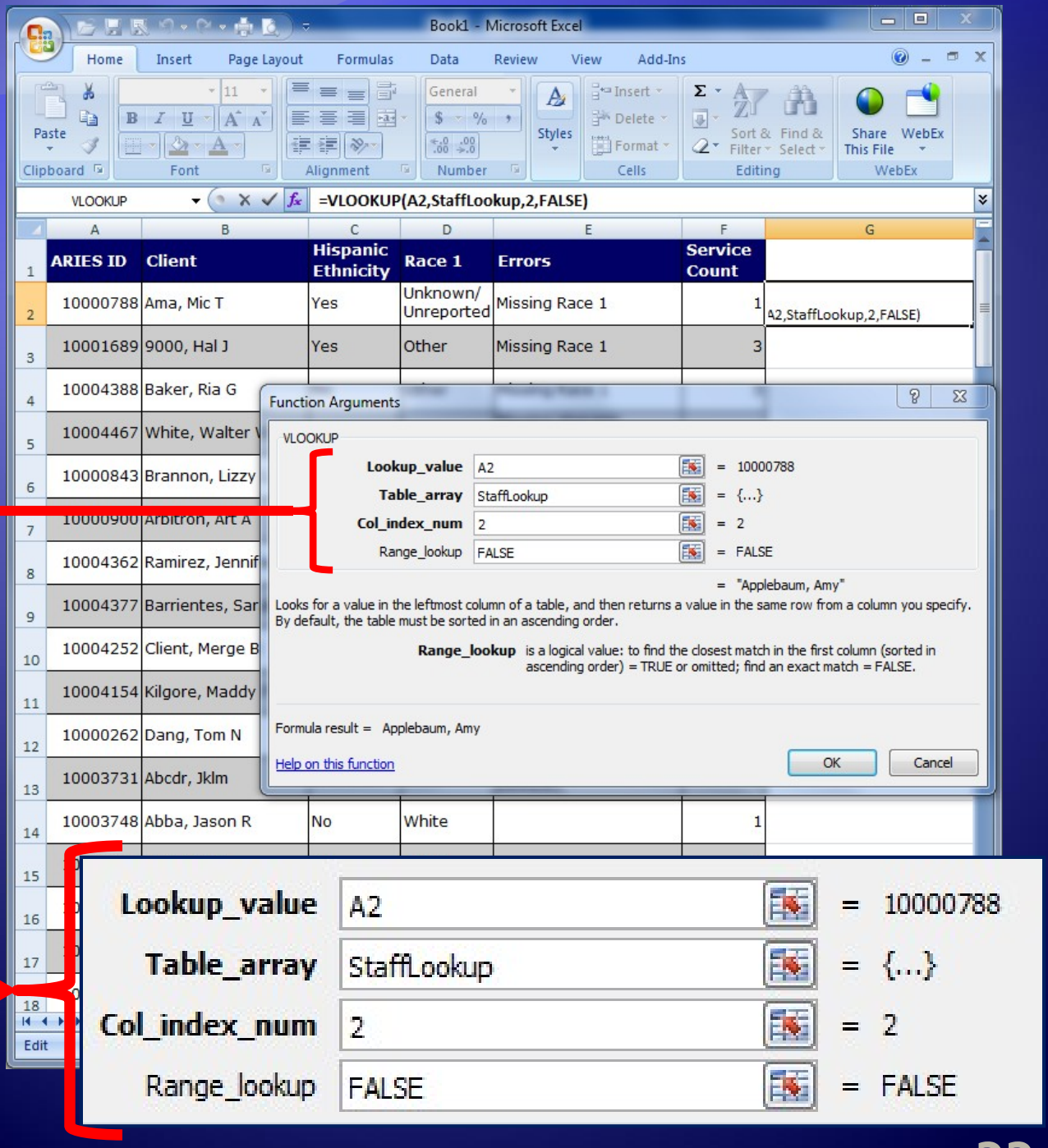
Online Demo

On Sheet 1, first blank cell of first data row, click Function (fx) and select VLOOKUP:



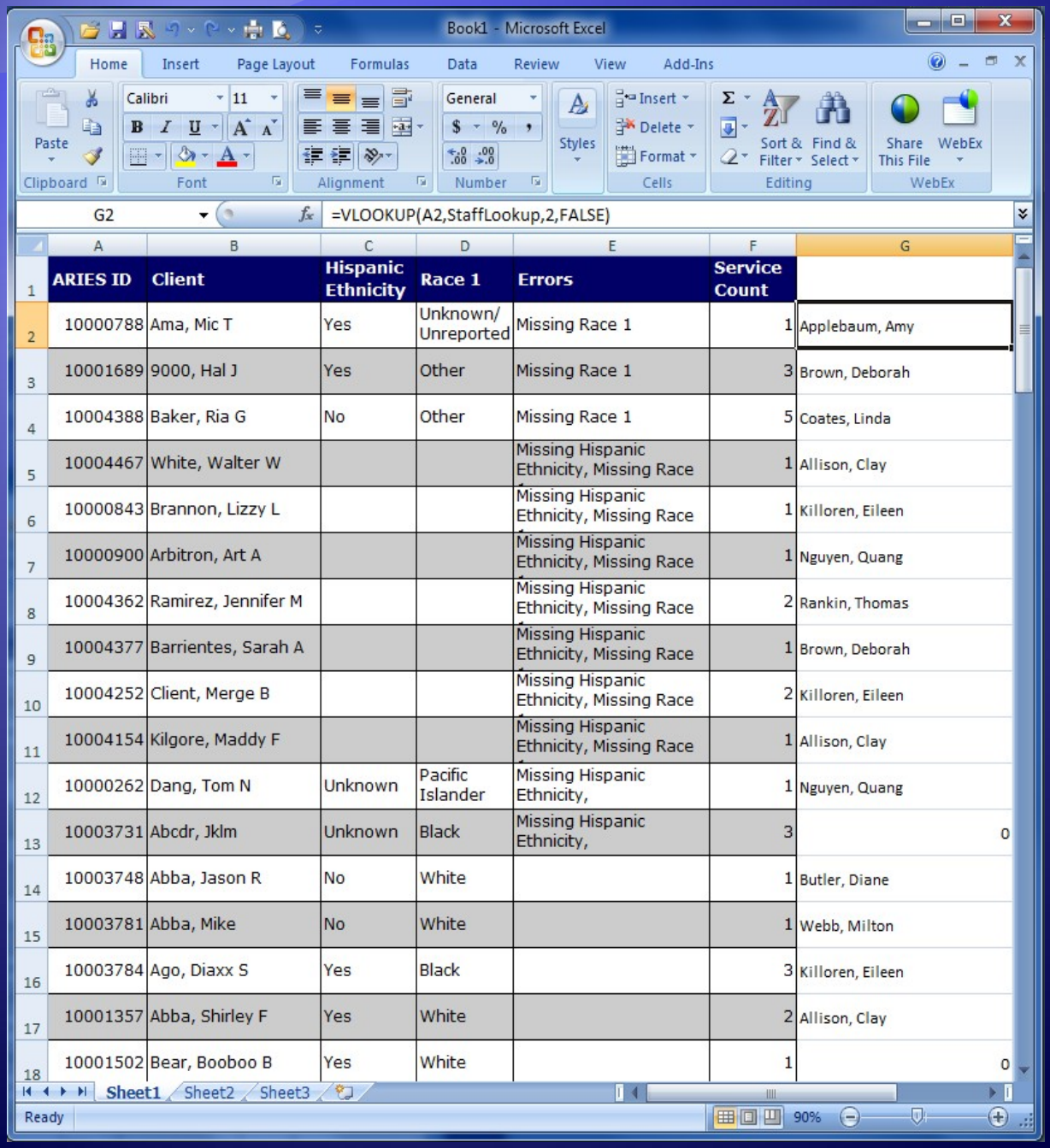
Online Demo

Enter the function parameters below:



Online Demo

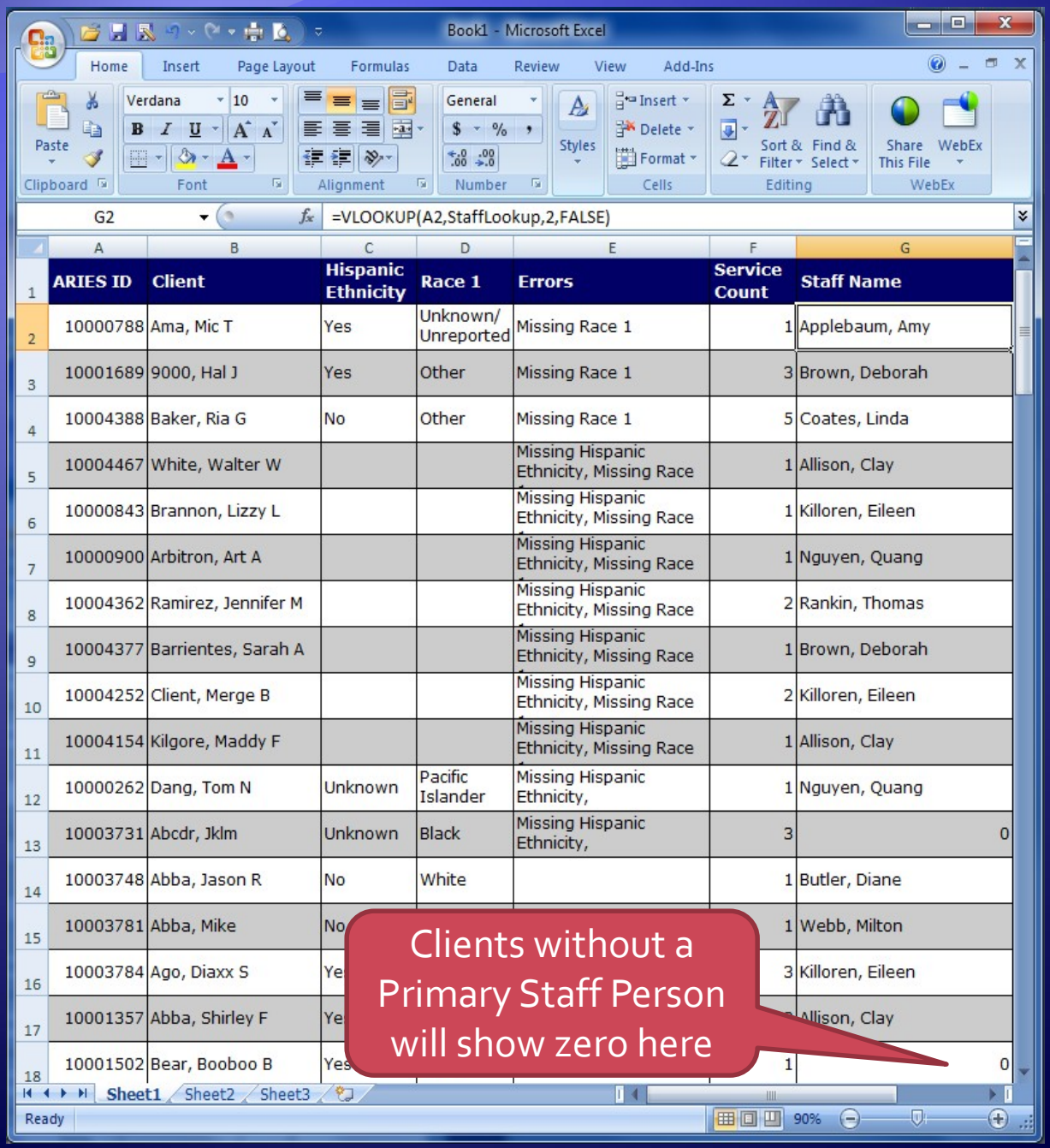
Copy the cell containing the VLOOKUP function to the rest of the column:



	A	B	C	D	E	F	G
1	ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors	Service Count	
2	10000788	Ama, Mic T	Yes	Unknown/ Unreported	Missing Race 1	1	Applebaum, Amy
3	10001689	9000, Hal J	Yes	Other	Missing Race 1	3	Brown, Deborah
4	10004388	Baker, Ria G	No	Other	Missing Race 1	5	Coates, Linda
5	10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race	1	Allison, Clay
6	10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race	1	Killoren, Eileen
7	10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race	1	Nguyen, Quang
8	10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race	2	Rankin, Thomas
9	10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race	1	Brown, Deborah
10	10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race	2	Killoren, Eileen
11	10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race	1	Allison, Clay
12	10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1	Nguyen, Quang
13	10003731	Abcdr, Jklm	Unknown	Black	Missing Hispanic Ethnicity,	3	0
14	10003748	Abba, Jason R	No	White		1	Butler, Diane
15	10003781	Abba, Mike	No	White		1	Webb, Milton
16	10003784	Ago, Diaxx S	Yes	Black		3	Killoren, Eileen
17	10001357	Abba, Shirley F	Yes	White		2	Allison, Clay
18	10001502	Bear, Booboo B	Yes	White		1	0

Online Demo

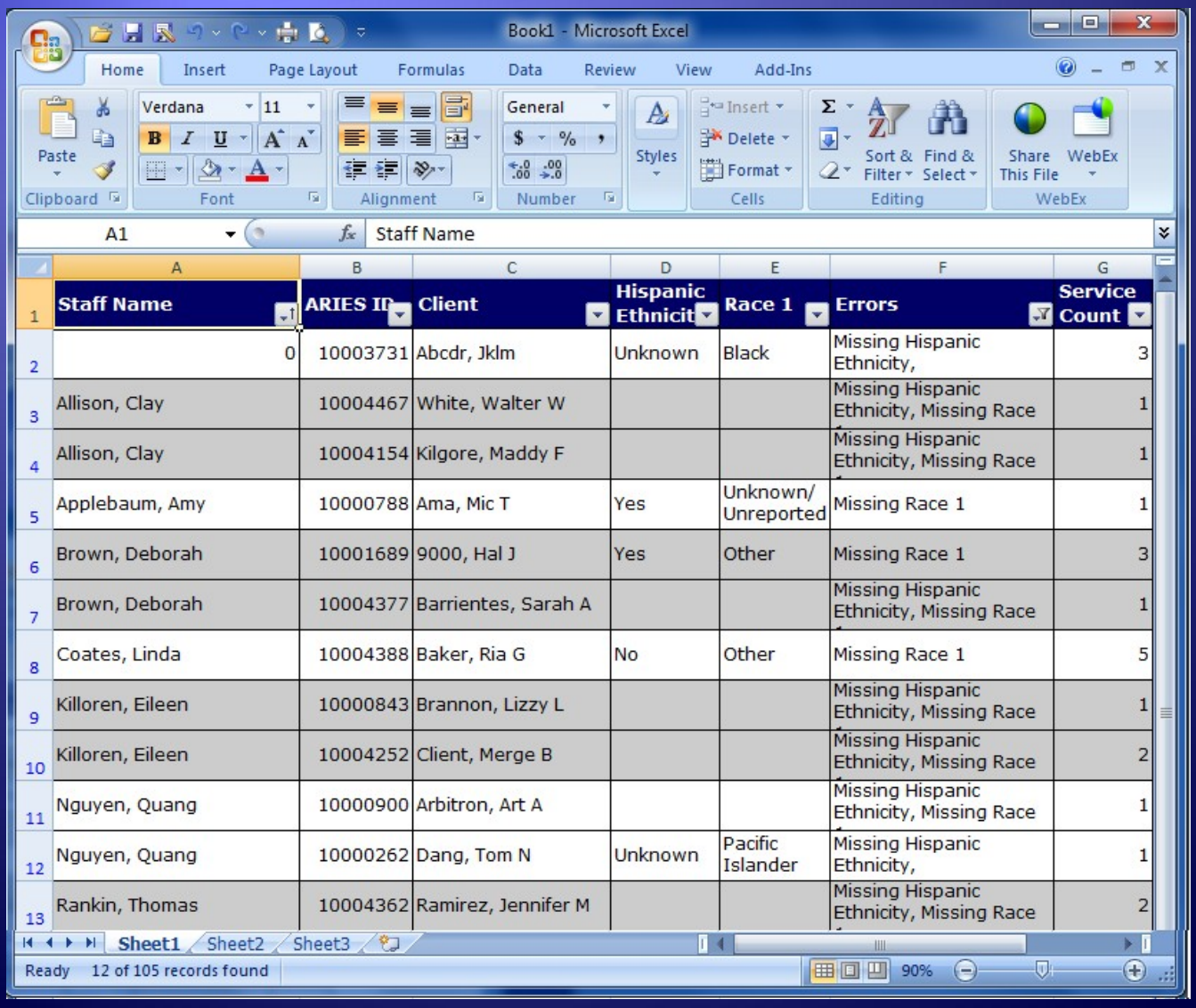
Format as desired, and *VOILA!*



	A	B	C	D	E	F	G
1	ARIES ID	Client	Hispanic Ethnicity	Race 1	Errors	Service Count	Staff Name
2	10000788	Ama, Mic T	Yes	Unknown/ Unreported	Missing Race 1	1	Applebaum, Amy
3	10001689	9000, Hal J	Yes	Other	Missing Race 1	3	Brown, Deborah
4	10004388	Baker, Ria G	No	Other	Missing Race 1	5	Coates, Linda
5	10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race	1	Allison, Clay
6	10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race	1	Killoren, Eileen
7	10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race	1	Nguyen, Quang
8	10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race	2	Rankin, Thomas
9	10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race	1	Brown, Deborah
10	10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race	2	Killoren, Eileen
11	10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race	1	Allison, Clay
12	10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1	Nguyen, Quang
13	10003731	Abcdr, Jklm	Unknown	Black	Missing Hispanic Ethnicity,	3	0
14	10003748	Abba, Jason R	No	White		1	Butler, Diane
15	10003781	Abba, Mike	No			1	Webb, Milton
16	10003784	Ago, Diaxx S	Ye			3	Killoren, Eileen
17	10001357	Abba, Shirley F	Ye				Allison, Clay
18	10001502	Bear, Booboo B	Yes			1	0

Online Demo

You can move the Staff column, sort on Staff, and filter on Errors (non-blank) to list only clients needing follow-up grouped by Primary Staff Person:



Staff Name	ARIES ID	Client	Hispanic Ethnicit	Race 1	Errors	Service Count
0	10003731	Abcdr, Jklm	Unknown	Black	Missing Hispanic Ethnicity,	3
Allison, Clay	10004467	White, Walter W			Missing Hispanic Ethnicity, Missing Race	1
Allison, Clay	10004154	Kilgore, Maddy F			Missing Hispanic Ethnicity, Missing Race	1
Applebaum, Amy	10000788	Ama, Mic T	Yes	Unknown/ Unreported	Missing Race 1	1
Brown, Deborah	10001689	9000, Hal J	Yes	Other	Missing Race 1	3
Brown, Deborah	10004377	Barrientes, Sarah A			Missing Hispanic Ethnicity, Missing Race	1
Coates, Linda	10004388	Baker, Ria G	No	Other	Missing Race 1	5
Killoren, Eileen	10000843	Brannon, Lizzy L			Missing Hispanic Ethnicity, Missing Race	1
Killoren, Eileen	10004252	Client, Merge B			Missing Hispanic Ethnicity, Missing Race	2
Nguyen, Quang	10000900	Arbitron, Art A			Missing Hispanic Ethnicity, Missing Race	1
Nguyen, Quang	10000262	Dang, Tom N	Unknown	Pacific Islander	Missing Hispanic Ethnicity,	1
Rankin, Thomas	10004362	Ramirez, Jennifer M			Missing Hispanic Ethnicity, Missing Race	2

Final Thoughts

- The Excel VLOOKUP() function can be used for other purposes:
  - Staff Person who entered a Service
  - Agency holding an Eligibility Doc
  - Staff Person who did an Assessment
- Microsoft Access can also merge data from two reports:
  - Export each report as XML file
  - Import first file, rename temp table
  - Import second file, rename temp table
  - Create query, joining on ARIES ID

Final Thoughts

- The ARIES Help Desk can assist with report design of Primary and Secondary reports for merging.
- The ARIES Help Desk cannot provide detailed assistance with Microsoft Excel.

ARIES Help Desk

866-411-ARIES (2743)